



SIFA Membership Services

Rivalling those of any other provider

Compliance Services

Comprehensive **Compliance Manual**, with all TCF and other precedents, up-dated on-line

Telephone and e-mail **helplines**

Regulatory guidance on the protected Members' Area of www.sifa.co.uk

Monthly **Cockerill's Law** compliance bulletins

Optional compliance **health check visits** and reports (extra charge)

Trade association representation with **FSA**

Support with **FSA** applications

Technical Services

SIFA DataBank web site, containing product data and comparison tables

Bulletins: **What's new on DataBank**, Market Eclectica etc

Trustinvest and other **SIFA** handbooks for each adviser

Technical and **Pensions** helpdesk and library

NMBA technical training workshops

Club facilities

Access to **SIFA Directors** for advice

Free twice-yearly **local member group** meetings

8 Client newsletters per year, in Word for copying

A range of logo-ed client **marketing material**

Licence to use the **SIFA member** logo

Deals and discounts

PREFERENTIAL TERMS

for professional indemnity insurance

Selectapension

AKG reports

PlanLab

Taxbriefs

DISCOUNTS ON

Intelliflo

Synaptic comparator

Analytics

Platforum due diligence reports

Professional indemnity insurance

Annuity service

Trigold and Mortgage Brain

FREE

Product and Fund Clarity and Weblines

Dynamic planner via Verbatim

(including risk profiling, asset allocation tools and model portfolios)

Rayner Spencer Mills fund research

How to apply

Contact **Dave Seager**,
SIFA Development Director,
on **07717 130929** or dave@sifa.co.uk
Then, apply via
www.sifa.co.uk/membership

The cost

The cost of SIFA Membership alone is **£150 pm inc VAT + £25 pm inc VAT per adviser (up to 4)**

The cost of SIFA Membership and SIFA Professional combined is **£295 pm inc VAT**
(see separate SIFA Professional leaflet)

Who can join

All IFA firms which satisfy the following criteria are welcome:

- **Independent**
- **Directly authorised**
- **Fee-based (includes commission off-set)**
- **At least one RDR qualified adviser**
- **A clean regulatory record**

Testimonials

"I have to say that I'm extremely pleased with the service and assistance we're receiving from you guys".

Giles Pidcock,
Fensham Howes,
West Yorks

"We have only good things to say about SIFA and becoming members was one of the best moves we made!"

Vanessa Sanderson,
Moore and Smalley LLP,
Preston

"Thanks for providing us with the tools and processes to make the recent FSA visit so smooth."

Stewart Thompson
BHP Financial Management,
Darlington